CA-PMM

Project Name: Electronic Services Expansion Project

OCIO Project #: 0860-091
Department: Board of Equalization
Revision Date: September 2009 Report

Status Report

Progress Report -- Team Member to Project Manager

Current Task Summary

Task or Deliverable	Scheduled Completion Date	Actual Completion Date	Issues?

Accomplished this week

Planned/Scheduled Completion in Next Two Weeks

Status Summary	Yes/No	Explanation
Will all assigned tasks be accomplished by their due date?		
Are there any planned tasks that won't be completed?		
Are there problems which affect your ability to accomplish assigned tasks?		
Do you plan to take time off that is not currently scheduled?		

Status of Assigned Issues

Issue Number	Description	Due Date	Status

Status Report – Project Manager to Sponsor

Current Status Report

Questions	Yes/No	Cause	Impact	Action Required
1. Were recent milestones completed on schedule?	Yes			
2. Were any key milestones or deliverables rescheduled?	No			
3. Was work done that was not planned?	Yes	Mandated ABx 4 18 FY 2009-10 Trailer Bill (Registration and eFiling for Qualified Service Businesses)	Adjustment to project schedule, increase in scope and work effort	None, updated project schedule and charter approved
4. Were there any changes to scope?	Yes	Mandated ABx 4 18 FY 2009-10 Trailer Bill (Registration and eFiling for Qualified Service Businesses)	Increase in project scope	None, Project Charter updated and approved by the Executive Sponsor
5. Were tasks added that were not originally estimated?	Yes	Mandated ABx 4 18 FY 2009-10 Trailer Bill (Registration and eFiling for Qualified Service Businesses)	Additional tasks need to be added to the project schedule.	None, updated project schedule approved by the ESEP Steering Committee

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6. Were any tasks or milestones removed?	No			
7. Were any scheduled tasks not started?	No			
8. Are there any new major issues?	No			
9. Are there any staffing problems?	No			

Look Ahead View

Questions	Yes/No	Impact	Action Required
1. Will upcoming critical path milestones or deliverables be delayed?	No		
2. Do any key milestones or deliverables need to be rescheduled?	No		
3. Is there any unplanned work that needs to be done?	No		
4. Are there any expected or recommended changes to scope?	No		
5. Are there any tasks not originally estimated that will need to be added?	No		
6. Are there any tasks or milestones that should be removed from the plan?	No		
7. Are there any scheduled tasks whose start will likely be delayed?	No		
8. Are any major new issues foreseeable?	No		
9. Are any staffing problems anticipated?	No		

Current Status and Accomplishments:
Describe deliverables completed and milestones met during **this reporting period.**

Sub Project "eFiling for Fuel Retailers and Distributors (G/SG)"
Construction Phase Continued
Sub Project "Electronic Registration (eReg)"
System Requirement Gathering Continued
Sub-Project "eFiling for Cigarette Manufacturers/Distributors (Cig Mgr/Dist)"
Logical Phase Began
Sub Project "In State Service Business Registration and eFiling (Service Business)"
Logical Phase Began

Project Milestones:
List key milestones and their dates from the project schedule.

Milestone	Target Date	Forecast Date	Status	Cause & Impact to Implementation Date	Date Completed

Variances
Check the appropriate box for each project element listed below. Please describe the actions you plan to take for those items marked "Caution" or "Significant Variance".

	On Plan <5%	Caution 5-10%	Significant Variance >10%	Action Required
Schedule	x			
Milestones	x			
Deliverables	x			
Resources	x			
OneTime Cost	x			
Continuing Cost	x			

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Status Reports – Sponsor to Steering Committee

Summary Milestones and Highlights

Project Milestones:
List key milestones and their dates from the project schedule. Explain in issues section if a milestone's status is behind.

Milestone	Target Date	Forecast Date	Status	If Delayed, Impact to Implementation Date	Date Completed

Variances
Check the appropriate box for each project element listed below. Please describe the actions you plan to take for those items marked "Caution" or "Significant Variance".
* *Priority of schedule, scope, budget, and quality from Final Ranking established in the Priority Analysis*

	On Plan <5%	Caution 5-10%	Significant Variance >10%	Action Required
Schedule	x			
Milestones	x			
Deliverables	x			
Resources	x			
One Time Cost	x			
Continuing Cost	x			

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Monitoring Vital Signs Scorecard

Vital Sign	Variance	Value	Your Score
1. Customer Buy-In	High Degree of Buy-In	0	0
	Medium Degree of Buy-In	1	
	Low Degree of Buy-In	2	
2. Technology Viability	Strong Viability	0	0
	Medium Viability	1	
	Weak Viability	2	
3. Status of the Critical Path (delay)	<5%	0	0
	5% to 10%	1	
	>10%	2	
4. Cost-to-Date vs. Estimated Cost-to-Date (higher)	<5%	0	0
	5% to 10%	1	
	>10%	2	
5. High-Probability, High-Impact Risks	0 to 3	0	1
	4 to 6	1	
	>6	2	
6. Unresolved Issues (on time resolution)	On time	0	0
	Late with no impact	1	
	Late impacting the critical path	2	
7. Sponsorship Commitment	Fully engaged	0	0
	Partially engaged	1	
	Inadequate enagement	2	
8. Strategy Alignment	Strong alignment	0	0
	Partial alignment	1	
	Weak or no alignment	2	
9. Value-to-Business	Strong	0	0
	Medium	1	
	Weak	2	
10. Vendor Viability (provide rationale for the rating in the field following the scorecard)	Strong	0	1
	Medium	1	
	Weak	2	
11. Milestone Hit Rate (rate of achievement as planned)	>90% on time	0	0
	80-90% on time	1	
	<80% on time	2	
12. Deliverable Hit Rate (rate of production as planned)	>90% on time	0	0
	80-90% on time	1	
	<80% on time	2	
13. Actual vs. Planned Resources	>90% assigned and available	0	0
	80-90% assigned and available	1	
	<80% assigned and available	2	
14. Overtime Utilization (% of effort that is overtime)	<15%	0	0
	15-25%	1	
	>25%	2	
15. Team Effectiveness	Highly Effective	0	0
	Moderately Effective	1	
	Ineffective	2	
		Total	2

Green = 0 - 8
Yellow = 9 - 19
Red = 20+

Vendor Viability Rating Rationale

The ESEP project team is comprised of BOE staff and a large number of contract resources (system analysts, programmers, Technology Project Manager). BOE systems a